



SAP Training



Personnel Administration Terms, Concepts, and Display Data

PA210




SLIDE 1

Notes:


Welcome to BEACON *PA210 - Terms, Concepts, and Display Data* training course.

SAP Training — Welcome and Introductions



Welcome!

- Introductions
- Sign-in sheet
- Tent cards
- Rest rooms
- Breaks
- Parking Lot
- Classroom etiquette
 - **Cell phones off**
 - **No side conversations**



SLIDE 2


Notes:

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

Pre-requisites

- BEACON Overview BC100
- SAP Basic Navigation BC110
- Personnel Administration Overview PA200

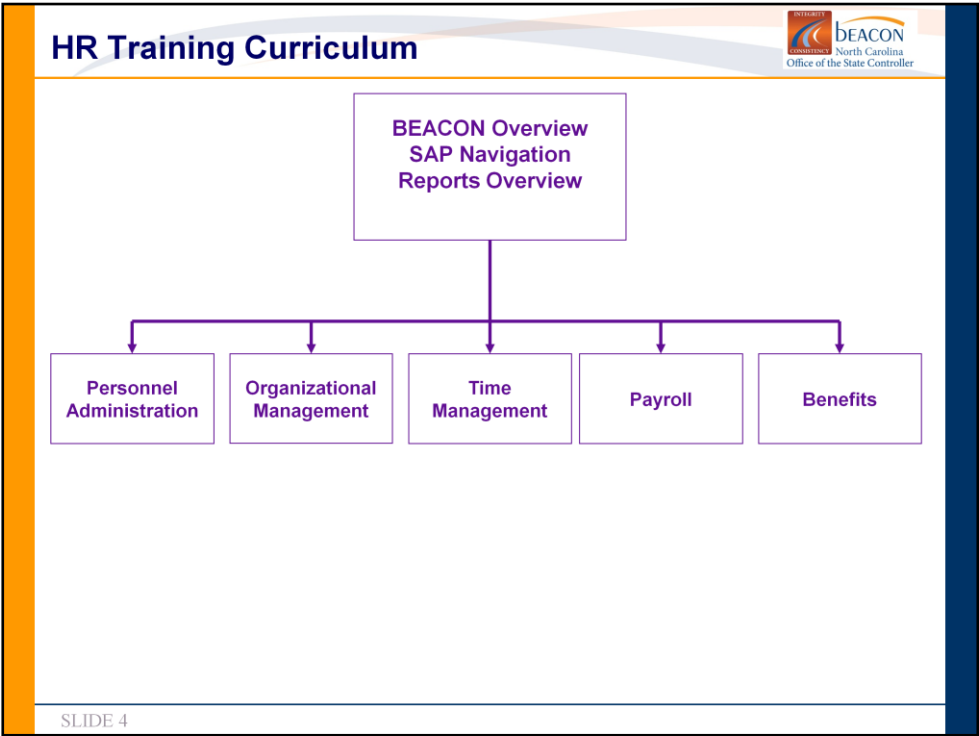


SLIDE 3

Notes:

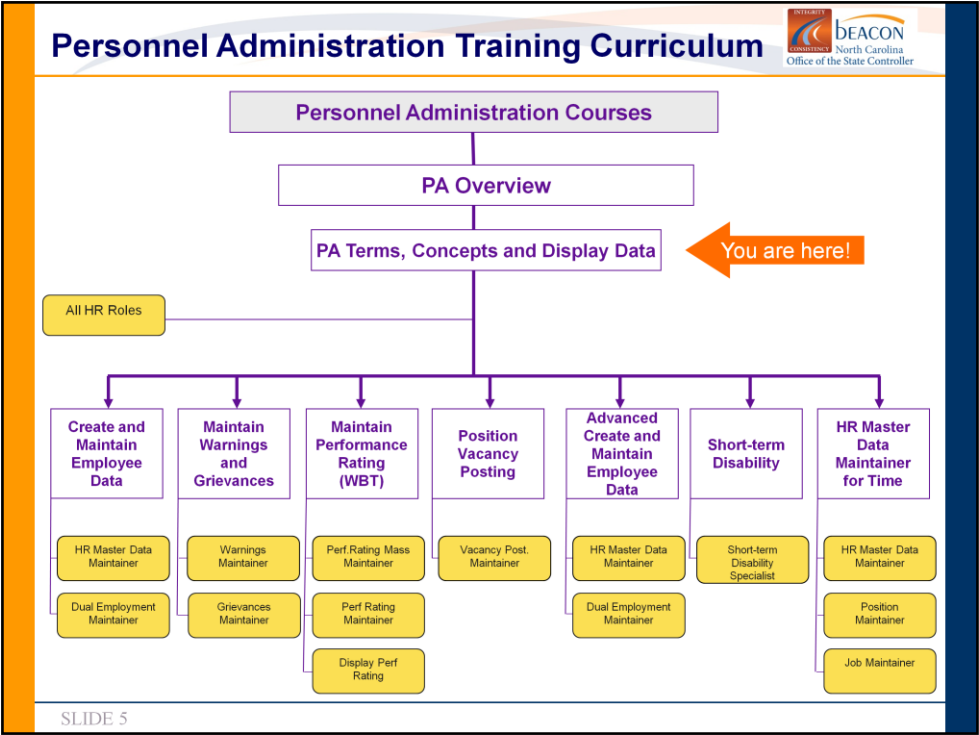
There are three pre-requisites that you must take before attending this class. Attending these pre-requisites ensures that you are adequately prepared to learn the new processes, concepts, terms and data entry skills that are covered in this course.

You may also find it useful to take the Employee Self Service and Manager Self Service courses, although they are not required for the PA curriculum. However, they are mandatory for other requirements.



The BEACON HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Personnel Administration module.

Notes:



Notes:

Within the Personnel Administration module, there are several courses. Everyone attends this first course, *Personnel Administration Overview*. Your position determines which additional courses you may be required to attend.

In addition to the above courses, there are several web-based courses available:

- BEACON Overview
- Basic Navigation
- Personnel Administration Overview (PA200)


Course Map – PA Overview

Lesson 1: Terms and Definitions

Lesson 2: Display Employee Data

Lesson 3: Course Review

SLIDE 6



All of the job aids and simulations that are used in this class are available on BEACON University. For the most up-to-date versions, you should always use the materials on the BEACON University website.



Notes:

Course Objectives

Upon completion of this course, you should be able to:

- Define key terms and processes
- Display information in an employee's SAP personnel record
- Distinguish between the display transaction codes

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This course is designed to provide you with general knowledge about Personnel Administration and how to display data.

Notes:

Strategy for Training



<ul style="list-style-type: none">Tell me	Concepts Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN
<ul style="list-style-type: none">Show me	Demonstrations Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF
<ul style="list-style-type: none">Let me	Exercises Student will complete the exercises which allows for hands-on practice in class – HANDS ON
<ul style="list-style-type: none">Support me	Availability Instructor will be available to answer questions while the students complete the exercises.


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The Terms, Concepts, and Display Data Guide provides a copy of the PowerPoint presentation used in the classroom training. Observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment.

Notes:

Reference materials

- Student Guide
- Job Aids
- Other resources
 - Online help
 - Simulations
 - Work instructions





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Simulations let you practice using SAP in a clearly defined and safe environment. Each simulation has instructions to guide you through the task. Simulations are available only for select transactions.

Notes:

Online help

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures
- Includes links to simulations

To access BEACON Help, select the **Help > BEACON Help** menu option from any SAP ERP screen.




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Notes:

Your Training Responsibilities

- Attend the applicable training class
- Be actively involved and participate in training
- Practice after training



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This course, as is true with all of the HR courses, is not designed for your specific division or agency procedures and policies. The training does not include all of the scenarios you encounter in your current job role. Instead, the courses in the Personnel Administration curriculum are designed with two purposes in mind:

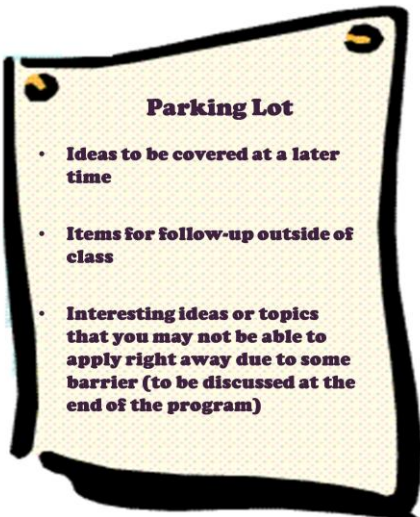
- To give you the basic knowledge and skills you need in order to perform your tasks in the SAP application as well as to perform any related business processes.
- To demonstrate how you can further develop your skills by using the classroom materials, Work Instructions, Online Help and practice sessions to continue your SAP education after training is completed.

As you can see, you play an active role in your training development. BEACON SAP HR/Payroll training is designed to ensure that you have the information you need in order to perform your duties and responsibilities.

Notes:

The Parking Lot





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The *Parking Lot* will be used to record any concerns, expectations, and questions that cannot be answered during the class. If needed, your instructors will follow up with answers to questions that could not be answered in class.

When you think of a concern, ask the instructor. If the instructor /navigator cannot answer the question, it will be forwarded to the BEACON Training office. The Training Solutions Center will contact the subject matter experts to determine an answer and will notify the instructor of the answer.

The instructor will share the answer if it is received before the end of class. If an expectation or concern cannot be addressed in class, the instructor will place it on a parking lot, research it, and provide the class with a response at a later date.


Notes:

Course Map – PA Overview

Lesson 1: Terms and Definitions

Lesson 2: Display Employee Data

Lesson 3: Course Review



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All of the job aids and simulations that are used in this class are available on BEACON University. For the most up-to-date versions, you should always use the materials on the BEACON University website.


Notes:

Lesson Objectives

After completing this lesson, you should be able to:

- Identify and define basic SAP Personnel Administration terms
- Explain the importance of dates in SAP HR
- Identify reasons associated with Actions
- Explain how to find actions that were previously used in PMIS

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Project BEACON
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Office of the State Controller

In order to communicate effectively, it is important that everyone has the same understanding of new terms and concepts in the Project BEACON environment.

This lesson provides terms that will become familiar to you. Each term is explained in detail in the next pages.

Notes:

Enterprise Structure

Display Organizational Assignment (0001)

Org Structure

Personnel No80000033NamePatsy Alvarado

EEGroupA

SPA Employees

PersA1601

Environment Natural Resources

EESubgroupA1

FT N-FLSAOT Perm

StatuActive

Start01/01/2008

to12/31/9999

Chng06/09/2008

ECATT

Enterprise structure

CoCodeNC01

STATE OF NC

Pers.area1601

Environment Natural Resour

SubareaAC01

7day Norm

Cost Ctr1699999999

DENR

Bus. Area1600

DENR

Fund169999999

DENR-SUSPENCE

Func. Area6000000000000001

Personnel structure

EE groupA

SPA Employees

Payr.area01

NC Monthly

EE subgroupA1

FT N-FLSAOT Perm

Contract

Organizational plan

Percentage100.00

Position65002441

800904000072

Contracts Administrator

Job key30000004

Adm Ofr

Administrative Officer II

Org. Unit20003893

435040000000

ENR SO ASIT Asst Sect

Org key160116999999999

Enterprise structure

Personnel structure

Organizational structure

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SAP uses the following areas to organize organizational and employee information:

- Enterprise Structure
- Personnel Areas
- Organizational Structure

Notes:

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Enterprise Structure

Display Organizational Assignment (0001)

Org Structure

Personnel No: 80000033Name: Patsy Alvarado

EEGroup: A SPA EmployeesPersA: 1601 Environment Natural Resources

EESubgroup: A1 FT N-FLSAOT PermStatu: Active

Start: 01/01/2008to: 12/31/9999Chng: 06/09/2008 ECATT

Enterprise structure

CoCode: NC01STATE OF NC

Pers area: 1601 Environment Natural ResourSubarea: AC01Tday Norm

Cost Ctr: 1699999999DENRBus. Area: 1600DENRFund: 1699999999DENR-SUSPENCE

Func. Area: 6000000000000001

Personnel structure

EE group: A SPA EmployeesPayr. area: 01 NC Monthly

EE subgroup: A1 FT N-FLSAOT PermContract:

Organizational plan

Percentage: 100.00

Position: 85002441800904000072

Job key: 30000004Contracts AdministratorAdm OfrAdministrative Officer II

Org. Unit: 20003893435040000000ENR SO ASIT Asst Sect

Org. key: 16011699999999

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Notes:

The Enterprise structure defines the legal and financial (fiscal) structure of the State of North Carolina and is comprised of:

- Company Code
- Personnel Areas
- Personnel Sub-Areas
- Cost Center
- Functional Area
- Fund
- Business Area

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Company Code

- The company code allows for independent accounting.
- Multiple company codes can exist.

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Display Organizational Assignment (0001)

Org Structure

Personnel No	80000033	Name	Patsy Alvarado		
EEGroup	A	SPA Employees	PersA	1601	Environment Natural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	01/01/2008	to	12/31/9999	Chng	06/09/2008 ECATT

Enterprise structure

CoCode	NC01	STATE OF NC			
Pers.area	1601	Environment Natural Resour Subarea	AC01	7day Norm	
Cost Ctr	1699999999	DENR	Bus. Area	1600	DENR
			Fund	169999999	DENR-SUSPENSE
Func. Area	6000000000000001				

Personnel structure

EE group	A	SPA Employees	Payr.area	01	NC Monthly
EE subgroup	A1	FT N-FLSAOT Perm	Contract		

Organizational plan

Percentage	100.00				
Position	65002441	800904000072			
		Contracts Administrator			
Job key	30000804	Adm Ofr			
		Administrative Officer II			
Org. Unit	20003993	435040000000			
		ENR SO ASIT Asst Sect			
Org.key	16011699999999				

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Notes:

A **Company Code** is an HR integration point with SAP financial accounting applications and is an integral part of an employee's HR record through the connection with Personnel Administration. The Company Code represents the highest levels of the organizational structure. The State of North Carolina will use two company codes: NC01 and NC02. All agencies, except Transportation and Employment Security Commission, use NC01.

NC01 – State of North Carolina - NCAS

NC01 represents primary government agencies and component units which use NCAS (North Carolina Accounting System) as their main accounting system. Until NCAS is replaced, payroll financial postings from company code NC01 will be interfaced to NCAS.

NC02 – State of North Carolina - Others

NC02 represents any primary government agency or component unit that does *not* use NCAS as its primary accounting system, but is included in the HR/Payroll project for processing payroll transactions. These agencies or component units have their own accounting system and chart of accounts, and require payroll entries to be interfaced to their accounting systems.

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Personnel Area

- Designates specific agency for Payroll
- Related to Company Code
- Assigned at the position level and defaults to the employee's record

Display Organizational Assignment (0001)

Org Structure

Personnel No. 80000633

Name Patsy Alvarado

EEGroup A SPA Employees

PersA 1601 Environment Natural Resources

EESubgroup A1 FT N-FLSAOT Perm

Statu Active

Start 01/01/2008 to 12/31/9999

Chng 06/09/2008 ECAIT

Enterprise structure

CoCode NC01 STATE OF NC

Pers area 1601 Environment Natural Resour Subarea AC01 7day Norm

Cost Ctr 1699999999 DENR

Bus Area 1600 DENR

Fund 169999999 DENR-SUSPENCE

Func Area 6000000000000001

Personnel structure

EE group A SPA Employees

Payr area 01 NC Monthly

EE subgroup A1 FT N-FLSAOT Perm

Contract

Organizational plan

Percentage 100.00

Position 65002441 800904000072

Job key 30000804 Contracts Administrator

Adm Ofr Administrative Officer II

Org Unit 20003893 435040000000

ENR SO ASIT Asst Sect

Org key 160116999999999

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Notes:

The **Personnel Area** is tied directly to the company code and is used by Payroll to identify the specific agency for whom the employee works. A company code can include one or more Personnel Areas. Personnel Area is important for selecting dates for reporting. Personnel areas determine where wages and salaries are posted and from where they are paid. Some examples are:

Company Code NC01

- 1401 State Controller
- 1601 Environmental and Natural Sciences
- Z101 State Personnel
- 8701 School of Science and Math

Company Code NC02

- 1501 Transportation
- 4401 Employment Security Commission

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Personnel Subarea

- Assigned at the position level and defaults to the employee's record
- Defines Time Management rules

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Display Organizational Assignment (0001)

Org Structure

Personnel No	800000033	Name	Patsy Alvarado
EEGroup	A	SPA Employees	PersA 1601 Environment Natural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu Active
Start	01/01/2008	to	12/31/9999
Chng	06/09/2008	ECATT	

Enterprise structure

CoCode	NC01	STATE OF NC
Pers.area	1601	Environment Natural Resou
Cost Ctr	1699999999	DENR
Subarea	AC01	7day Norm
Bus. Area	1600	DENR
Fund	169999999	DENR-SUSPENCE
Func. Area	6000000000000001	

Personnel structure

EE group	A	SPA Employees	Payr.area	01	NC Monthly
EE subgroup	A1	FT N-FLSAOT Perm	Contract		

Organizational plan

Percentage	100.00	
Position	65002441	800904000072
Job key	30000804	Contracts Administrator
Org. Unit	20003893	Adm Ofr
Org.key	16011699999999	Administrative Officer II
		435040000000
		ENR SO ASIT Asst Sect

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The **Personnel Subarea (PSA)** further defines the Personnel Area. PSA has been designed to identify various working schedules so that Time Management can define groups of specific time entry rules (for example, 7-day schedule; 24/7 etc.). PSA groups similar jobs to conform to time and attendance rules. There are five key elements that determine an employee's Personnel Subarea assignment:

- Calendar assignment
- Relationship to the state (regular vs. temp vs. elected vs. contractor)
- Quota accrual rules/requirements
- Work schedule rule (to restrict the available work schedules)
- Working period (which defines Overtime Period)

See the *Personnel Area and Subarea (PSA) Job Aid* for detailed information concerning the relevant PSAs associated with each Personnel Area. Job Aids are accessible online at the BEACON University website:

www.BEACON.nc.gov/training/index.html

Notes:

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Miscellaneous Fields

- Cost Center
- Fund
- Functional Area
- Business Area

Display Organizational Assignment (0001)

Org Structure

Personnel No. 80000033 Name Patsy Alvarado

EEGroup A SPA Employees PersA 1601 Environment Natural Resources

EESubgroup A1 FT N-FLSAOT Perm Status Active

Start 01/01/2008 to 12/31/9999 Chng 06/09/2008 ECATT

Enterprise structure

CoCode NC01 STATE OF NC

Pers area 1601 Environment Natural Resour Subarea AC01 7day Norm

Cost Ctr 1699999999 DENR Bus. Area 1600 DENR

Fund 1699999999 DENR-SUSPENCE

Func. Area 6000000000000001

Personnel structure

EE group A SPA Employees Payr area 01 NC Monthly

EE subgroup A1 FT N-FLSAOT Perm Contract

Organizational plan

Percentage 100.00

Position 65002441 800904000072

Job key 30000004 Contracts Administrator

Org. Unit 20003993 435040000000 Administrative Officer II

Org. key 16011699999999 ENR SO ASIT Asst Sect

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Notes:

The **Cost Center**, **Functional Area** and **Fund** fields will default from the Organizational Unit and therefore be grayed out. There is only one Functional Area for the whole *State*. There is only one default Cost Center and one default Fund per *Agency*. Neither the Functional Area nor the Fund are associated with the position.

A **Business Area** is a unit within a company code used by Finance. The Business Area is the lowest level at which a complete set of income statements and balance sheets can be processed. The Business Area represents a separate area of operations or responsibilities within an organization.

In most cases, the Business Area represents an Agency. The exceptions are:

- Justice (SBI)
- HHS (403-b)
- CCPS (Highway Patrol)

Personnel structure

Display Organizational Assignment (0001)

Org Structure

Personnel No: 80000833

Name: Patsy Alvarado

EEGroup: A SPA Employees

PersA: 1601 Environment Natural Resources

EESubgroup: A1 FT N-FLSAOT Perm

Statu: Active

Start: 01/01/2008

to: 12/31/9999

Chng: 06/09/2008 ECATT

Enterprise structure

CoCode: NC01

STATE OF NC

Pers.area: 1601

Environment Natural Resour

Subarea: AC01

7day Norm

Cost Ctr: 1699999999

DENR

Bus. Area: 1600

DENR

Fund: 169999999

DENR-SUSPENCE

Func. Area: 6000000000000001

Personnel structure

EE group: A SPA Employees

Payr.area: 01 NC Monthly

EE subgroup: A1 FT N-FLSAOT Perm

Contract:

Organizational plan

Percentage: 100.00

Position: 65002441

800904000072

Contracts Administrator

Job key: 30000804

Adm Ofr

Administrative Officer II

Org. Unit: 20003893

435040000000

ENR SO ASIT Asst Sect

Org.key: 16011699999999

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The Personnel structure is comprised of:

- Employee Group
- Employee Subgroup
- Payroll Area

Notes:

Employee Group

- Assigns employee appointment type
- Establishes rules for calculating leave and managing pay

Display Organizational Assignment (0001)

Org Structure

Personnel No	80000033	Name	Patsy Alvarado
EEGroup	A	SPA Employees	PersA 1601 Environment Natural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu Active
Start	01/01/2008	to	12/31/9999
Chng	06/09/2008	ECATT	

Enterprise structure

CoCode	NC01	STATE OF NC
Pers.area	1601	Environment Natural Resour
Subarea	AC01	7day Norm
Cost Ctr	1699999999	DENR
Bus. Area	1600	DENR
Fund	1699999999	DENR-SUSPENSE
Func. Area	6000000000000001	

Personnel structure

EE group	A	SPA Employees	Payr.area	01	NC Monthly
EE subgroup	A1	FTN-FLSAOT Perm	Contract		

Organizational plan

Percentage	100.00
Position	65002441 800904000072
	Contracts Administrator
Job key	30000804 Adm Ofc
	Administrative Officer II
Org. Unit	20003893 435040000000
	ENR SO ASIT Asst Sect
Org. key	16011699999999

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Notes:

In addition to identifying the employment status and the employee’s relationship to the State, the **Employee Group** also establishes business rules for calculating leave and personnel calculation rules for managing employee pay. This also provides for benefit eligibility determination in concert with further use in alternative reporting combinations. The table below illustrates just a few examples of the State of North Carolina Employee Groups.

- A – SPA Employee (subject to State Personnel Act)
- B – SPA Law Enforcement (subject to State Personnel Act)
- K – EPA Employees (Exempt from State Personnel Act)
- O – Supplemental Staff (temporaries, pick up firefighter, National guard, contractor, etc.)

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Employee Subgroup

- Defines employee work status (full time, part time) and the work schedule
- Determines detailed and specific calculation rules for employee pay
- Defines subject or not subject to FLSA Overtime (OT)

Display Organizational Assignment (0001)

Org Structure

Personnel No

80000033

Name

Patsy Aivarado

EEGroup

A

SPA Employees

PersA

1601

Environment Natural Resources

EESubgroup

A1

FTN-FLSAOT Perm

Statu

Active

Start

01/01/2008

to

12/31/9999

Chng

06/09/2008

ECATT

Enterprise structure

CoCode

NC01

STATE OF NC

Pers.area

1601

Environment Natural Resour

Subarea

AC01

7day Norm

Cost Ctr

1699999999

DENR

Bus. Area

1600

DENR

Fund

1699999999

DENR-SUSPENCE

Func. Area

6000000000000001

Personnel structure

EE group

A

SPA Employees

Payr.area

01

NC Monthly

EE subgroup

A1

FTN-FLSAOT Perm

Contract

Organizational plan

Percentage

100.00

Position

65002441

800904000072

Contracts Administrator

Job key

30000804

Adm Ofr

Administrative Officer II

Org. Unit

20003893

435040000000

ENR SO ASIT Asst Sect

Org.key

1601169999999999

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The **Employee Subgroup** defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime, and full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel Calculation Rule allows payroll to define different payroll procedures for different employee subgroups. Some examples are:

- A1 FTN-FLSAOT Perm [Full Time Not-(subject to) FLSA Overtime – Permanent]
- B1 FTS-FLSAOT Perm [Full time Subject (to) – FLSA Overtime – Permanent]
- Y8 PTS-FLSAOT Trne [Part-time Subject (to)-FLSA Overtime-Trainee]

The employee groups and subgroups are the same as those used in PMIS; however, they are organized very differently. There are many combinations of Employee Groups and Subgroups in SAP. If the incorrect Employee Group and Subgroup are entered, it impacts time, work against, dual employment, benefits, and pay. As discussed in PA200, you can continue to see why accuracy is so critical when data is entered.

See the *Employee Groups and Subgroups Job Aid* for details concerning the various groups and subgroup combinations.

Notes:

Payroll Area

- Describes the pay frequency and payroll cycle for each employee
- Defaults based on personnel area, personnel subarea, employee group, and employee subgroup
- Examples** – Monthly, Biweekly

Display Organizational Assignment (0001)

Org Structure

Personnel No.	80000033	Name	Patsy Alvarado		
EEGroup	A	SPA Employees	PersA	1601	Environment Natural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	01/01/2008	to	12/31/9999	Chng	06/09/2008 ECATT

Enterprise structure

CoCode	NC01	STATE OF NC			
Pers.area	1601	Environment Natural Resour	Subarea	AC01	7day Norm
Cost Ctr	1699999999	DENR	Bus. Area	1600	DENR
			Fund	169999999	DENR-SUSPENCE
Func. Area	6000000000000001				

Personnel structure

EE group	A	SPA Employees	Payr.area	01	NC Monthly
EE subgroup	A1	FT N-FLSAOT Perm	Contract		

Organizational plan

Percentage	100.00				
Position	65002441	800904000072			
		Contracts Administrator			
Job key	30000004	Adm Ofr			
		Administrative Officer II			
Org. Unit	20003893	435040000000			
		ENR SO ASIT Asst Sect			
Org key	16011699999999				

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The **Payroll Area** is derived from a combination of personnel area, personnel subarea, employee group and employee subgroup. The payroll area determines payroll cycle.

Notes:

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Payroll Area

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- Used as a selection to execute SAP payroll.
- Determines pay period, start date, end date, pay date and payroll frequency.

Payroll area 3 Entries found

Restrictions

PAr

Payroll area text

01 NC Monthly

04 NC Biweekly

99 Non-payroll-relevant

→

- Each employee is assigned a payroll area.

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Payroll accounting is performed for each payroll area.

SAP uses payroll areas to group together employees from whom payroll is run at the same time, and also to set the dates for the payroll period.

All temporary positions are in the biweekly cycle!

Notes:

Organizational Plan

Display Organizational Assignment (0001)

Org Structure

Personnel No. 800000033Name Patsy Alvarado

EEGroup A SPA EmployeesPersA 1601 Environment Natural Resources

EESubgroup A1 FT N-FLSAOT PermStatu Active

Start 01/01/2008to 12/31/9999Chng 06/09/2008 ECATT

Enterprise structure

CoCode NC01STATE OF NC

Pers.area 1601Environment Natural ResourSubarea AC017 day Norm

Cost Ctr 1699999999DENRBus. Area 1600DENRFund 169999999DENR-SUSPENCE

Personnel structure

EE group A SPA EmployeesPayr.area 01 NC Monthly

EE subgroup A1 FT N-FLSAOT PermContract

Organizational plan

Percentage 100.00

Position 65002441800904000072Contracts Administrator

Job key 30000004Adm OfrAdministrative Officer II

Org. Unit 20003893435040000000ENR SO ASIT Asst Sect

Org.key 16011699999999

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Notes:

The organizational plan identifies the:

- Percentage
- Position
- Job
- Org Unit
- Org key

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Percentage

Display Organizational Assignment (0001)

Org Structure

Personnel No. 800000033

Name Patsy Alvarado

EEGroup A SPA Employees

PersA 1601 Environment Natural Resources

EESubgroup A1 FT N-FLSAOT Perm

Statu Active

Start 01/01/2008

to 12/31/9999

Chng 06/09/2008 ECATT

Enterprise structure

CoCode NC01

STATE OF NC

Pers. area 1601

Environment Natural Resour

Subarea AC01

7 day Norm

Cost Ctr 1699999999

DENR

Bus. Area 1600

DENR

Fund 169999999

DENR-SUSPENCE

Func. Area 6000000000000001

Personnel structure

EE group A

SPA Employees

Payr. area 01

NC Monthly

EE subgroup A1

FT N-FLSAOT Perm

Contract

Organizational plan

Percentage 100.00

Position 65002441

800904000072

Contracts Administrator

Job key 30000004

Adm Ofc

Org. Unit 20003893

435040000000

Administrative Officer II

Org. key 16011699999999

ENR SO ASIT Asst Sect

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Notes:

The **Percentage** will always be 100% and identifies that the employee is working 100% of what he or she was offered and accepted.

For example, if an employee accepted a full time position at \$48,000, that employee's percentage will be 100%. By the same token, if a position is going to be shared, with two employees each working 20 hours at \$20,000, each of those employee's percentage will also be 100% (because each employee is working 100% of what was offered and accepted, which is a 20-hour work week at \$20k).

Organizational Unit

- An entity within the organization
- Example:
 - Wildlife (Agency/department)
 - Conservation Education (Division)
 - Communication (Section)
 - » Magazine (Branch)

Display Organizational Assignment (0001)

Org Structure

Personnel No. 80000033 Name Patsy Alvarado

EE Group A SPA Employees PersA 1601 Environment Natural Resources

EE Subgroup A1 FT N-FLSAOT Perm Statu Active

Start 01/01/2008 to 12/31/9999 Chng 06/09/2008 ECATT

Enterprise structure

CoCode NC01 STATE OF NC

Pers area 1601 Environment Natural Resour Subarea AC01 7day Norm

Cost Ctr 1699999999 DENR Bus Area 1600 DENR

Fund 1699999999 DENR-SUSPENCE

Func Area 6000000000000001

Personnel structure

EE group A SPA Employees Pay area 01 NC Monthly

EE subgroup A1 FT N-FLSAOT Perm Contract

Organizational plan

Percentage 100.00

Position 65002441 800904000072

Job key 30000004 Contracts Administrator

Adm Ofr

Adm Substitution Officer II

Org Unit 20003093 435040000000

ENR SO ASIT Asst Sect

Org key 16011699999999

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Notes:

An **Organizational (Org) Unit** is an entity within the organizational structure. An Org Unit can be the State of North Carolina, Agencies/departments, Divisions, sections, branches, work groups, or units throughout the organization.

Positions and the people who hold positions are assigned to an Organizational Unit. An Org Unit can have subordinate Org Units reporting to it, or it can be a subordinate that reports to another Org Unit.

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Job versus Position (1 of 2)	
Job	Position
<ul style="list-style-type: none">• Defines general classification of functions and duties that are identical across the State• Has a one to many ratio to positions• Defines EEO, Job Group, and Census Codes• Is not held by a person• Is the basis for creating positions• Is maintained by Shared Services	<ul style="list-style-type: none">• Represents specific tasks performed by a person• Has a many to one ratio to jobs• Belongs to an Organizational Unit• Inherits attributes from the job and organizational unit• Is held by a person• May be classified as Chief position• Is maintained by Agency and Shared Services


A **job** is the foundation from which positions are created. A job is a general *classification* of duties and attributes. Typical attributes are: function, job family, FLSA status and role. One job can be used to create many positions. A job is identified by a unique number. When you hear the term *class* or *classification* you will immediately know that a job is being referenced. Of course, the converse is also true—when you hear job, you will know it is a *class*.

A **position** inherits the general classification of duties and attributes from the job. However, additional specific tasks and duties are added to the position. Many positions can be created from only one job. Each position has its own unique number as an identifier.

In BEACON, you can see both the job (class) and the position title for an employee.

Notes:

Job versus Position (2 of 2)



Official Job (Class) Title	Position (Working) Title
<ul style="list-style-type: none">• Engineer (graded)	<ul style="list-style-type: none">• Water Quality Engineer• Air Quality Engineer• Building Systems Engineer• County Maintenance Engineer• Elevator Engineer• Environmental Engineer
<ul style="list-style-type: none">• Forestry Technician (banded)	<ul style="list-style-type: none">• County Ranger• Nursery Technician• District Ranger


SLIDE 30

An example of a job (class) and its related positions is engineering. There may be several different types of engineers in the organization. Each engineer position has its own specific tasks and duties; however, some general information is common to all engineer positions. That general information is created in the job and then used as a template to create the various engineer positions. The specific information pertinent to each engineer position is then added at the position level.

The relationship between jobs and positions is the same in both graded and banded jobs and positions.

Notes:

Positions



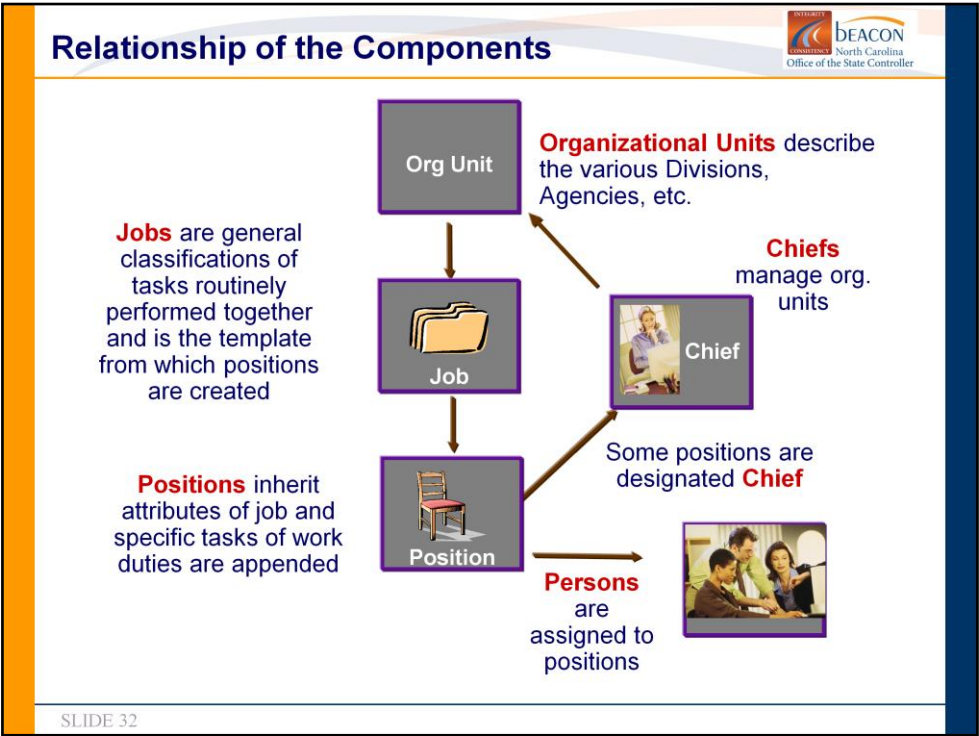
- A person holds a position
- Supervisors or managers who manage org units are identified as Chiefs
- A Chief manages his or her org unit and any subordinate org units.
- A Chief reports to other Chiefs just as org units report to other org units.
- Only one Chief is assigned to an org unit
- Position numbers are sequentially assigned

SLIDE 31

Notes:

A position is described by a job and held by a **person**. In SAP terms, a person is a holder of a position, and is not a holder of a job. When a person is hired using the PA modules, he or she is assigned to a position that resides in an organizational unit. It is important to remember that an employee's personnel record will contain the position name and number, org unit name and number, and job name and number as well as the person's name and personnel number. In BEACON, position numbers are assigned sequentially. There is no set numbering convention.

Some positions are designated as Chief positions. Any position that manages employees and/or an organizational unit will be designated a Chief position. When you think of a traditional organizational chart, you know that managers usually report to an upper level manager, and the division, agency or department reports up the organization as well. The same is true for the Chief position and the organizational unit that he or she manages.




Notes:

As illustrated, the org unit, job, position, and persons are related. After the org unit is created, a position is created from a job and assigned to the org unit. The position may be classified as a Chief position if it manages an org unit. Persons are assigned to the various positions.

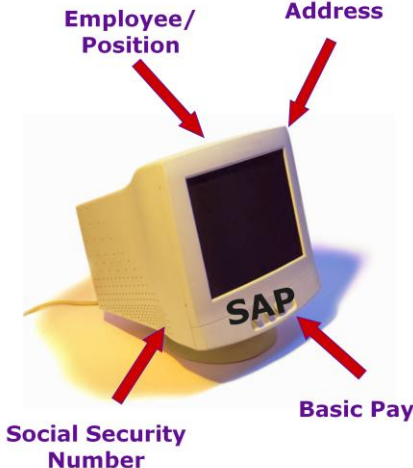
Org units, jobs and positions are maintained in the Organizational Management modules which are not part of Personnel Administration. However, it is necessary that you have a general understanding of how the components are related.

Master Data



HR Master Data

- Centrally stored employee information that is shared across modules within SAP
- Examples:** employee name, address, SSN, basic pay, position



SLIDE 33

Notes:

Master data is centrally stored information (data) that is shared across SAP modules. Master data contains the employee's personal, position, and organizational related information and includes all of the data required for processing benefits, time and payroll. Master Data represents individual entries such as employee name, address, basic pay and so forth.

Generally, master data is information that remains the same over a long period of time. Since SAP is integrated with other modules, those modules can use HR master data as applicable which eliminates duplicate data entries. Likewise, when needed, HR can use the master data associated with the other modules.

Infotypes

SAP Personnel Records

Display HR Master Data

Personnel no. 90170320

Name MAUREEN ADAMS

EE group A SPA Employees Pers area 1701 Wildlife Resources Com

EE subgroup AT FT N-FLSAOT Pe Cost Center 1721810000 ADMIN POLICY

Basic personal data

Contract data

Discontinued person

Net payroll

Adapt

Infotype test

Actions

Organizational Assignment

Personal Data

Addresses

Bank Details

Family Member/Dependents

Challenge

Period

From To

Today

All

From cur date

To Current Date

Current Period

Choose

Current week

Current month

Last week

Last month

Current Year

Direct selection

Infotype

Sty

Manual Personnel Records

Addresses (Infotype 0006)

Bank Details (Infotype 0009)

Actions (Infotype 0000)

Organizational Assignment (Infotype 0001)

SLIDE 34

Employee master data is organized into **infotypes**. Infotypes are used to group related data fields together to form units of information in the HR module. Infotype is the term SAP uses to identify the screens that make up an employee's personnel file. Just as you would have individual pieces of paper in a file folder to comprise a manual personnel record, you will now have electronic infotypes to comprise a personnel record. Just think of an infotype as a screen of information.

Infotypes form the basis of the actions and sequencing that allow for easier and faster data entry and updates.

Notes:

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Subtypes

Subtypes for infotype "Addresses" (1) - 3 Entries found

Restrictions

STyp Name

1 Permanent residence

4 Emergency contact

5 Mailing address

Addresses (Infotype 0006)

• Permanent (1)

• Emergency (4)


• Mailing (5)

SLIDE 35

A **subtype** is an expansion of an infotype to hold additional screens of information. For example, the State of North Carolina will record not only an employee’s permanent address, but the mailing address and emergency contact information as well. Therefore, the Addresses infotype (0006), contains subtypes (1, 4, 5) for those additional addresses. Only a few infotypes require subtypes.

Notes:

Infotypes Job Aid



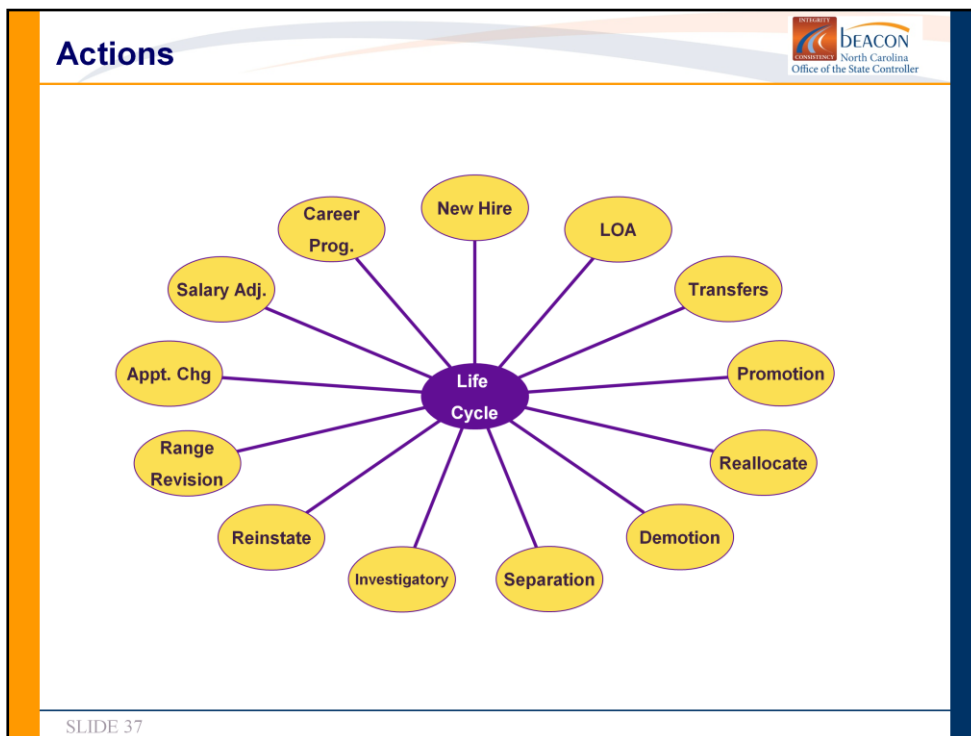
- Review the infotypes and descriptions on the *Infotypes Job Aid*
- In the exercises that follow, you will practice displaying the following infotypes:
 - Actions
 - Organizational Assignment
 - Personal Data

SLIDE 36

Notes:

Take a moment to review the *PA Infotypes Job Aid*. It contains a complete list of all the infotypes used in Personnel Administration, the code and a brief description. Discuss with the instructor any questions you have about infotypes and their descriptions.

As you work through the exercises on the following pages, observe the infotypes so that you can become familiar with the fields and types of information that are contained on each of them.



Notes:


When you consider the life cycle of an employee, you realize that it comprises many different events. SAP defines those events as a specific infotype called **Actions** (0000), which are illustrated above. An Action combines logically related infotypes that are needed to complete data entry for a specific event in the employee's life cycle into one *infogroup*. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action and eliminates the need for HR personnel to have to remember which screens need to be accessed and updated. You can see that the term Action in SAP has a different meaning than it did in PMIS.

With the Actions infotype (0000) you can display an overview of all the important changes related to an employee, and you can thus document the most important stages that an employee passes through in his or her history with the State.

Each Action has one or more reasons that are associated with the life cycle event.

Personnel Actions and Reasons Job Aid

- Previous PMIS actions are now SAP reasons
- Actions describe various events in the employee's life cycle
- Each Action has one or more associated reason
- Actions ensure that all necessary data is entered



SLIDE 38

Notes:


Take a moment to review the *PA-Actions-Reason-Definitions* Job Aid. It contains a complete list of all the reasons associated with each of the Actions.

You can see from the Job Aid that the actions that you previously used in PMIS are now the *reasons* in SAP. The HR personnel who creates an Action in SAP, determines and selects the appropriate Action for the employee's life cycle event. After the appropriate Action is selected, he or she then clicks a down-arrow and selects the applicable reason for the Action. When you display the Action, the reason also displays.

Discuss with the instructor any questions you have about Actions and the associated reasons. In the next lesson, you will have an opportunity to view an Action. After you learn to display an Action, you use the same process and methodology to display any Action.

Dates are Critical in SAP

- Every entry must have a beginning (effective) date
- SAP automatically assigns an end date
- Infotypes can be manually assigned an end date



SLIDE 39

Notes:

Every HR Action and infotype must have a beginning (effective) and ending date. When records are created or updated, the data entry personnel is required to enter an effective (beginning) date. The SAP effective date default is the current date. Therefore, data entry personnel must be especially diligent about entering the correct effective date when entering data.

SAP automatically assigns an end date to the new data (more about this momentarily), as well as assigns an end date to the previous data. An end date can also be manually entered by HR data entry personnel.

Validity Periods

Start and end dates that define the life span of an infotype

Display Personal Data

Personnel No.	70170320	Name	KAUREEN ADAMS
EE group	A SPA Employees	Personnel ar	1701 Wildlife Resources Commission
EE subgroup	A1 FT N-FLSAOT Perm	Status	Active
Start	01/01/2007	To	12/31/9999
Changed on		05/22/2007 KAUREEN	

Start date

End date

Display Addresses

Personnel No.	70170320	Name	KAUREEN ADAMS
EE group	A SPA Employees	Personnel ar	1701 Wildlife Resources Commission
EE subgroup	A1 FT N-FLSAOT Perm	Status	Active
Start	01/01/2007	to	12/31/9999
Changed on		04/18/2007 KAUREEN	

Start date

End date

SLIDE 40

Notes:

When a record is created, it must have a beginning or start date and an ending date, which is called the **validity period**. Although the data entry personnel will always know the start date of a record, he or she often won't know the end date. For example, if an employee is hired or promoted today, the end date for either of those records is unknown. To accommodate for that uncertainty, SAP allocates an end date of December 31, 9999 (sometimes referred to as the end of time) for all current records. When that current record ends, SAP applies the appropriate end date.


When an infotype in an employee's SAP personnel record is revised, the old record is not lost or overwritten (unless it is a correction entry), it just ceases to be the most current record. The old record remains in the system as part of the employee's history. Historical records will have actual start and end dates; the current record's end date is 12/31/9999. In case of a correction entry, the incorrect data is overwritten because you obviously don't need a historical record of the incorrect data.

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Delimit (1 of 2)

- Application of an end date to a previous record
- History is created
- End date becomes the day before the effective date of the newly created record



Existing Record - New Hire

Start	11/17/2006	To	12/31/9999
-------	------------	----	------------

SLIDE 41

Notes:

Delimit means to put an end date on a previous record. When the new record for an infotype is created, SAP automatically delimits the previous record, thereby preserving history. Any record with an end date other than 12/31/9999 has been delimited.

In the example illustrated above, the employee's existing Actions infotype is the new hire record. At the time the employee was hired, it was unknown when the end date for the new hire Action infotype would occur. Therefore, SAP assigned 12/31/9999 as the end date.

Delimit (2 of 2)



- Delimit

Former Existing Record - New Hire

Start11/17/2006To03/04/2007

New Record - Promotion

Start3/05/2007To12/31/9999

SLIDE 42

Notes:

When a new Action is created, SAP automatically delimits the former record *one day prior* to the new record, because records must not overlap. For example, a person cannot be married and single at the same time; or, be an active employee and at the same time be terminated.

Continuing with our Actions example, the employee was promoted 3/5/07. The promotion now becomes the new Actions record, with an end date until the end of time. The former existing record (the New Hire) was delimited to 3/4/2007, which is one day prior to the promotion start date.

Since SAP is date driven, it is important to understand the concept of records using validity periods, with beginning and ending dates. This allows many records to exist for an employee. You can retrace employees' personnel records throughout their time with an organization.

Infotypes Delimited

Infotype Edit Goto Extras System Help

Display Addresses (0006)

Personnel No. 05301554

Name Whitney INT30-4705-AC07-B-B1-1

EEGroup B SPA Law Enforcement

Position 4701 Crime Control & Public Safety

EESubgroup B1 FT S-FLSAOT Perm

Status Active

Start 08/16/2007 to 12/31/9999 Changed on 08/28/2007 GHENDRIX

Address type Permanent residence

City Raleigh

Statezip code NC North Carolina 27612

Country Key USA

Telephone Number 919 772-5630

New address effective date with 12/31/9999 as end date.

Infotype Edit Goto Extras System Help

Display Addresses (0006)

Personnel No. 05301554

Name Whitney INT30-4705-AC07-B-B1-1

EEGroup B SPA Law Enforcement

Position 4701 Crime Control & Public Safety

EESubgroup B1 FT S-FLSAOT Perm

Status Active

Start 03/19/2007 to 08/15/2007 Changed on 05/30/2007 WCREECH

Address type Permanent residence

City Raleigh

Statezip code NC North Carolina 27612

Country Key USA

Telephone Number 919 772-5630

Old address end date delimited.

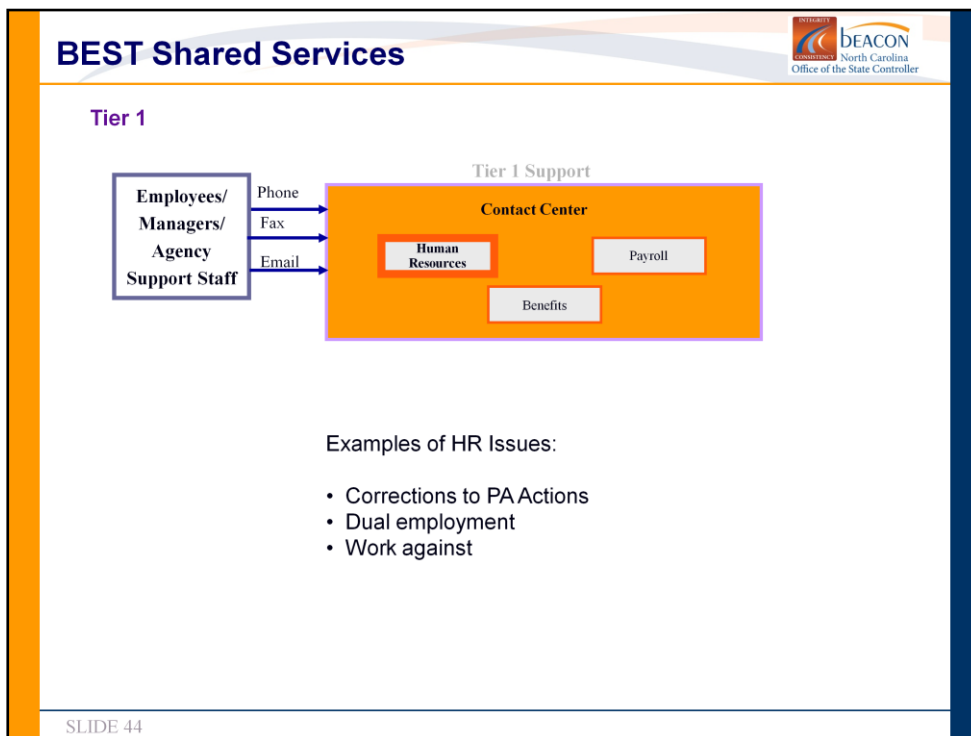
SLIDE 43

Notes:

The preceding example was for the Actions (New Hire, Promotion) infotype. However, the same concept is true for individual infotypes as well.

In the above example, the employee moved to a new permanent address effective 8/16/2007. When the new permanent address was entered with the 8/16/2007 effective date, SAP automatically assigned the end date as 12/31/9999 and delimited the old permanent address as of 8/15/2007.

The employee's other addresses, emergency contact and mailing address, still have their original end dates of 12/31/9999 because no changes have been made to them. In this case, the Addresses infotype has several subtypes, all with ending dates of 12/31/9999.

**Notes:**

The BEACON Enterprise Support Team (BEST) Shared Services is a group of employees and managers who provide a point of contact to answer questions as well as research and resolve issues. BEST Shared Services is:

- A team of support specialists with access to common knowledge content and management tools
- A single point of contact for all initial questions
- Available to employees, managers, business partners, and Agency support staff
- Available via phone, fax, or email
 - 1-866-NCBEST4U
 - 1-866-622-3784
 - 919-707-0707-in Raleigh
 - BESTSharedServices@ncosc.net
- Able to either provide immediate answers, or route calls to appropriate expert or support group
- Able to establish Alerts for known issues

Lesson Review




In this lesson, you learned to:

- Identify and define basic SAP Personnel Administration terms
- Explain the importance of dates in SAP HR

SLIDE 45

Notes:

Activity



Review – match terms and definitions

- The instructor has two decks of cards, each deck a different color. The decks have been shuffled and are placed face down. One set of cards contains a term; the other set contains a definition. You are to take a card from each of the decks, and then try to find the person who has the match to each of your cards.
- There may be more cards than there are participants. In that case, the instructor will place any remaining cards face up so that the terms and definitions can be seen. If you can't find a person that matches your cards, it may still be in the deck!

SLIDE 46

Note to instructor:

Prior to the activity, shuffle each deck independently and place face down on a table.

*There will probably be more cards than there are participants. If that happens, after each participant takes a card from each deck, turn any remaining cards in both decks **face up** so that the terms and definitions can be clearly seen.*

Notes:

Course Map – PA Overview

Lesson 1: Terms and Definitions

Lesson 2: Display Employee Data

Lesson 3: Course Review

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Notes:

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Differentiate between the two display transactions
- Locate employees in SAP
- Display an Action and associated reason for the Action
- Display an individual infotype

SLIDE 48




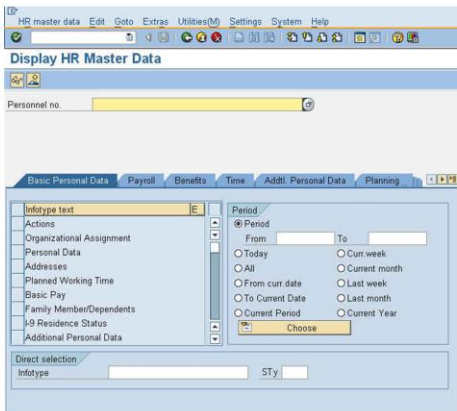
DEACON
North Carolina
Office of the State Controller

Notes:

Transaction Codes

- PA10 – Use to display the personnel file
- PA20 – Use to display individual infotypes in PA





SLIDE 49

To display personnel information, you will use either transaction code **PA10** or **PA20**. With the exception of Shared Services, you will only see the employees within your own Division or Agency. In a similar manner, you will only see those infotypes to which you have the security access to view. For example, if an employee has a grievance infotype, but your security access doesn't include grievances, you will not be able to see that record for your employee.

PA10 is used to display an employee's personnel record. It is the equivalent of having a personnel record on several pieces of paper stapled together in logical sequence. Using PA10 is an efficient way to look at the personnel record.


PA20 is used to display individual infotypes. Using PA20 saves time when you need to look at only one or two pieces of information in a personnel file. For example, if you only need to view the employee's salary, you can go directly to the Basic Pay infotype (0008). However, if you used PA10, you would have to page forward until you reached that particular infotype.

Notes:


2.1 - Instructor Demonstration

Log on to SAP

- In this demonstration, the Instructor will:
 - Access the SAP training client
 - Enter the training user id and password



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Watch as the instructor illustrates how to log on to the SAP training client, enter the user name and password, and access the Easy Access screen.

Note to instructor: After you reach the Easy Access screen, you can maximize the SAP screen for overhead viewing by using the **Customize Local Layout** button.


From the menu, click the Customize Local Layout button. Select **Font** and change the font size to **18**.

Notes:


2.2 - Exercise

Log on to SAP

- Access the training client
- Use the User ID and password that has been posted on your classroom PC
- Access the Easy Access screen



SLIDE 51

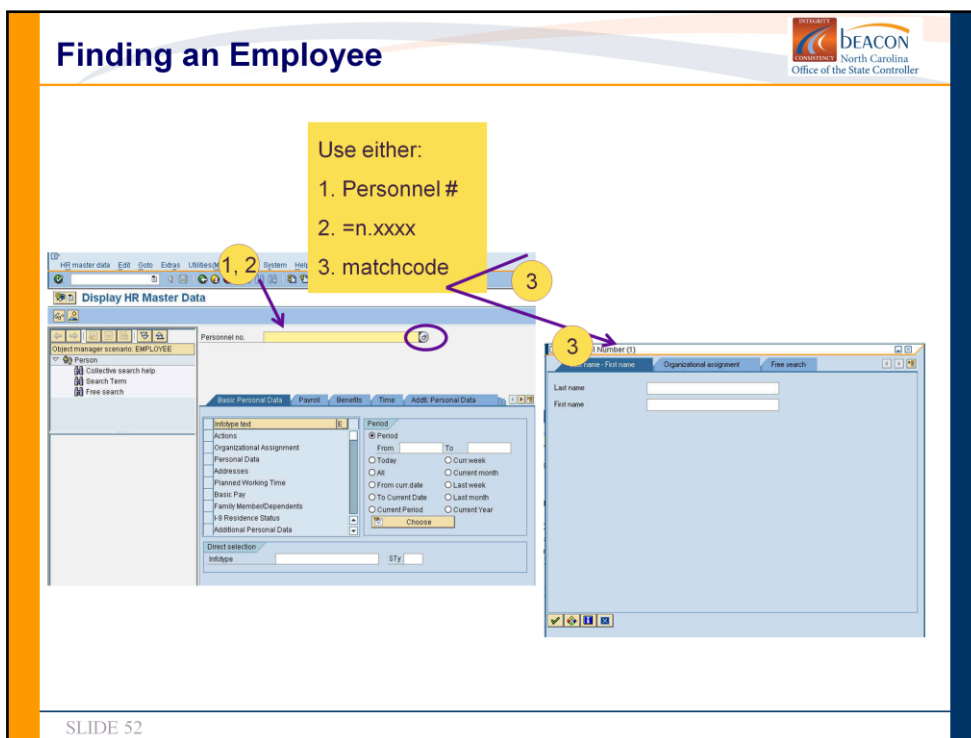


Scenario:

You are ready to begin viewing the data contained in an employee's master data using the menu path. First, you must log on to SAP.

1. Access the SAP training client.
2. Enter the User ID and password that is assigned to your classroom PC.
3. Stop when you have reached the Easy Access screen.

Notes:



Notes:

Before you can display employee data, you must identify the employee that you want to view. There are a variety of ways you can identify or search for an employee:

1. Enter the personnel number into the *Personnel no.* field.
2. Use the shortcut in the Personnel No. field to search for the employee using the last name:


=n.xxxxx (equals, n, dot, last name)—no spaces
Example: =n.Hendrix

A list of all of the employees with that last name displays. Double-click to select the appropriate employee and press **Enter**.


3. Use the match code at the end of the Personnel No. field. You can then search for the employee by last and first name, personnel number or org assignment.

NOTE: Many SAP fields contain a matchcode, indicating that you can search for applicable information for the specific field.

2.3 - Instructor Demonstration



- In this demonstration, the Instructor will:
 - Use the menu path to access PA10
 - Illustrate how to search for an employee using the matchcode
- Employee name:
 - **Maureen Ahmed**



SLIDE 53

Watch as the instructor illustrates how to use the menu path to access PA10. The instructor will search for Maureen H. Ahmed by using the matchcode function and the employee's last name.

Notes:


1. From the SAP Easy Access screen, use the following menu path:
Human Resources > Personnel Management > Administration > HR Master Data > Personnel File
2. Click the **matchcode** button.
3. At the *Personnel Number (1)* screen, type **Ahmed** in the Last Name field.
4. Click the **Start Search** button. A list is displayed, even if there is only one employee with the last name. Double click the applicable employee. The employee's personnel number is populated in the Personnel No. field. You must press **Enter** in order for the employee's name to display on the screen.

NOTE: As an alternative to using the menu code, you can enter the transaction code directly into the Command field and then press Enter.


2.4 - Exercise

In this exercise, you will:

- Use the menu path to access PA10
- Use the matchcode function
- Select the appropriate employee
- Employee name:
 - **Maureen Ahmed**



SLIDE 54




Scenario:







Use the menu path to access PA10. Search for Maureen H. Ahmed by using the matchcode function and the employee's last name. Follow the instructions on the preceding page.


Notes:

2.5 - Instructor Demonstration



Display an employee's personnel file

- In this demonstration, the Instructor will:
 - View the infotypes associated with the employee's personnel file
 - Illustrate the following functions:
 - *Display* 
 - *Overview* 
 - *Next Record* 
 - *Previous Record* 
 - *Choose (drill down)* 
-  [PA10 Display Personnel File](#)



SLIDE 55

Notes:


The instructor will access a simulation and demonstrate how to use the various functions available on the infotypes.

As the instructor progresses through each infotype (screen), observe the name and number of the infotype and compare it to the *Infotypes and Descriptions* handout. Review the fields on the individual infotypes so that you can become familiar with the various types of information on each one.

As a reminder, in the training class you have access to all Actions and infotypes. However, in your work environment, your access will be limited based on your BEACON HR role.


When the instructor demonstrates the use of the Overview function, observe that the transactions for the infotype display in a list, or summary. The most current record (with the data 12/31/9999) is at the top of the list. This is opposite to how current records are displayed in PMIS.

2.6 - Exercise



Display an employee's personnel file

- View all of the infotypes associated with the personnel file
- Use the appropriate function to go forward and backward in the file
- On the Actions infotype, drill down to the detail
 - The most current record is on top (opposite of PMIS)
- Answer the questions about the employee
- Employee name:
 - **Maureen Ahmed**



SLIDE 56

Scenario:

You want to view the employee's entire personnel file. You prefer to see all of the data rather than viewing the infotypes individually.

Transaction Code: PA10 Personnel File

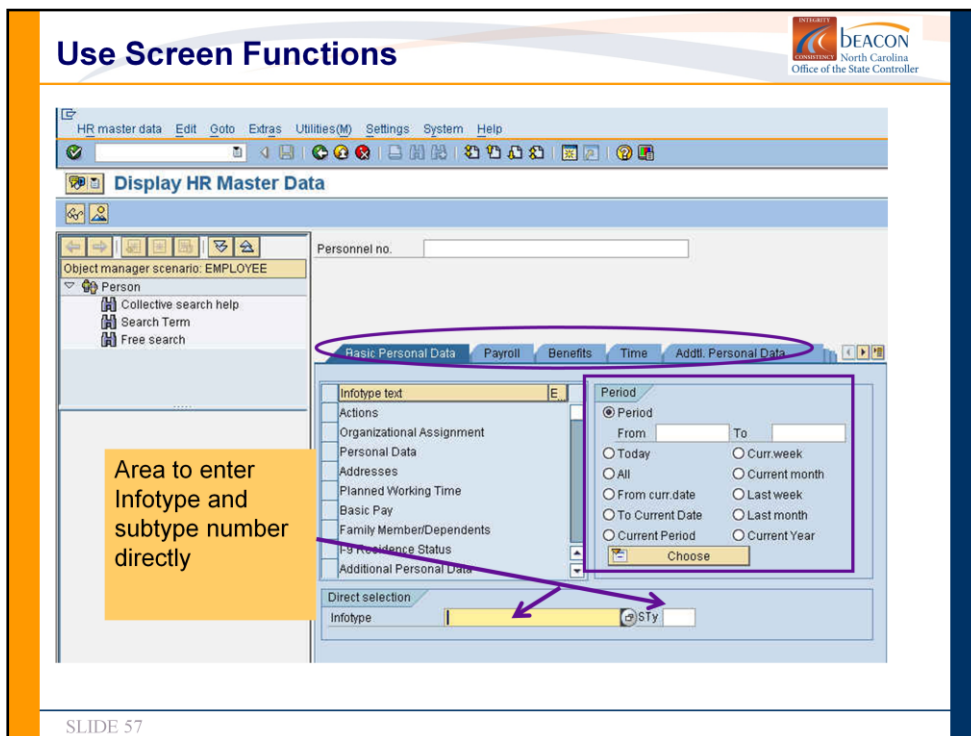
Questions/Results:

1. On what date was the employee hired?_____
2. T or F: The New Hire date is the most current record____

How do you know your answer is correct?
3. What is the employee's position number? _____

Position title?_____
4. What is the employee's personnel number?_____
5. Which infotypes did you use to find this information?

Notes:



SLIDE 57

Notes:

When you use PA20 to access the *Display HR Master Data* screen, you can use several options to choose the individual infotypes you wish to view:


Tab: The infotypes are grouped together by subject matter on a Tab menu. Merely select the Tab you want to access, or use the display all tabs button.

Period: You have various options regarding the time frame you wish to use when displaying an infotype. It is important when you are viewing infotypes to ensure that you have selected the appropriate time frame. If an infotype does not display, it could be because it was not valid during the time period you have selected. Some infotypes will only display if the *All* option has been selected.


Direct Selection: You can either enter the infotype code and subtype in the *Direct Selection* field, or use the matchcode to search for the infotype by name.


The left panel, the Object Manager, can be hidden from view by selecting **Settings > Hide Object Manager** on the menu.

2.7 - Instructor Demonstration



Display an employee's Actions

- In this demonstration, the Instructor will:
 - Use the short cut method to display a different transaction code
 - Use the short cut method to find an employee
 - Use PA20 to view an Employee's Actions
- Employee's name:
 - **Nicole Milam**
-  [PA20 Display HR Master Data](#)



SLIDE 58

Notes:


The instructor will first demonstrate how to change from one transaction code to another without going back to the Easy Access screen. By using /nxx (for example, /nPA20), you can immediately go from one transaction code to another. Using this short cut method when you are entering data, however, does not prompt you to save your data.

In addition, the instructor will use the =n.xxx shortcut method to find the employee.

Once again, as the instructor moves through each infotype (screen), observe the name and number of the infotype and compare it to the *Infotypes and Descriptions* handout. Review the fields on the individual infotypes so that you can become familiar with the various types of information on each one.


1. In the Command field, type **/nPA20**.
2. Press **Enter**.
3. At the *Display HR Master Data* screen, type **=n.milam** in the *Personnel No.* field.
4. Press **Enter**.

2.8 - Exercise



Display Actions

- In this scenario, view an employee's Actions
- The employee's name:
 - Nicole Milam



SLIDE 59

Scenario:

You want to view the employee's Actions information. You don't want to scroll through several pages of information to view the data you are seeking. Use the appropriate transaction code and the instructions on the previous page to view the Actions. Refer to the *PA Infotypes* handout for details about each infotype code and description.

Questions/Results:

1. Besides the new hire, what other Actions and reasons have been entered for the employee?

2. Was the employee's salary affected by any of the Actions?


3. If yes, what was the previous salary?_____.

What is the new salary?_____

4. What are the numbers of the infotypes you used to find this information? _____


Notes:

2.9 - Instructor Demonstration



Display Organizational Assignment

- In this scenario, the instructor will:
 - Use the Personnel Number to select an employee
 - Display the Organizational Assignment Infotype
 - Enter the infotype number
- Employee's number:
 - **80000030**



SLIDE 60


Watch as the instructor enters the Organizational Assignment infotype number (0001) into the *Infotype* field and selects the Display option.

In this example, the personnel number is known and entered into the *Personnel No.* field. However, after the instructor enters the personnel number, the **Enter** button must be selected (or press Enter on the keyboard). Otherwise, it is displayed as though the previous employee is still on the screen.


1. Enter **80000030** in the *Personnel No.* field.
2. Press **Enter**.
3. From the *Display HR Master Data* screen, type **0001** in the *Infotype* field.
4. Press **Enter**.
5. Click the **Display** and then the **Overview** options to illustrate the difference.

Notes:

2.10 - Exercise



- In this scenario, view information about an employee's org unit, position, and FLSA status
- Employee:
 - 80000030



SLIDE 61

Scenario:

For this exercise, use the *Infotypes and Descriptions* handout to determine which infotype contains the types of information described above.

Transaction code: PA20 *Display HR Master Data*

Questions/Results:

1. To which org unit does the employee belong? _____

2. What is the job title? _____

3. What is the position title? _____

Is the employee EPA or SPA? _____

4. Is the employee subject to FLSA overtime? _____

5. Is the employee permanent or temporary? _____


Full time or part-time? _____

6. What is the infotype number? _____


Notes:

2.11 - Exercise

- In this scenario, view information about an employee's marital and veteran status as well as the social security information.
- Use the *Infotypes and Descriptions* handout to determine which infotype you will use.
- Employee
 - **Elizabeth Watkins** (the same employee you used previously)



SLIDE 62



Scenario:

View the employee's information and answer the questions below.

Transaction code: *PA20 Display HR Master Data*

Questions/Results:

1. What is the marital status? _____
2. What is the employee's Personnel Number? _____
3. T or F: The employee's Personnel Number is the same as the Social Security Number. _____

How do you know your answer is correct?

4. What is the number of the infotype you used to find this information? _____


Notes:

Lesson Objectives

In this lesson you learned to:

- Differentiate between the two display transactions
- Locate employees in SAP
- Display an Action and associated reason for the action
- Display an infotype

SLIDE 63



DEACON
North Carolina
Office of the State Controller

Notes:

Course Map – PA Overview

Lesson 1: Terms and Definitions

Lesson 2: Display Employee Data

Lesson 3: Course Review

SLIDE 64


Notes:

Course Review

In this course you learned to:

- Define key terms and processes
- Display information in an employee's SAP personnel record
- Distinguish between the display transaction code

SLIDE 65




DEACON
North Carolina
Office of the State Controller

Notes:


Review Activity

For this scenario, use PA20 (rather than PA10) in order to practice and answer the following questions about an employee

– Employee name: **Maureen Ahmed**



SLIDE 66



1. Maureen has been on leave of absence for some time and her supervisor has called and asked when she is expected to return to work. _____,

Which infotype contains this information? _____

2. Maureen’s supervisor needs to know her current salary. _____.

On which infotype did you find this information? _____

3. What is Maureen’s birth date? _____.

Which infotype contains this data? _____

4. What is Maureen’s current military status? _____.

On which infotype did you find this information? _____

5. True or False: Maureen is an EPA employee who is subject to FLSA OT?

Which infotype did you review to find out? _____

Notes:

Level 1 – Course Evaluation

Level 1 evaluations are used by the BEACON Training Team to ensure students are experiencing their instruction in an environment and method that is conducive to learning.

The screenshot shows the BEACON website interface. The 'Learn' tab is active. In the left sidebar, under the 'Learn' section, 'Learning Activity Evaluations' is highlighted. An arrow points from this link to the 'Learning Activity Evaluations' link in the main content area. The main content area displays a list of training activities with columns for 'Activity', 'Date', and 'Status'. The activities listed are: OM 250 (April 28, 2008), TM 310 (April 28, 2008), OM 250 (April 28, 2008), and PY 200 (May 3, 2008). Below the list, there is a link to 'Click here to Proceed to the BEACON Materials Web Site' and a URL: http://www.beacon.nc.gov/training/training_materials.html.

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Level 1 Evaluations


The Level 1 evaluation classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).


Ask your instructor if you have any difficulty accessing the course evaluation.

Notes:

Next Steps

- Monitor BEACON communication
 - BEST Shared Services web site (especially the Updates tab)
 - URL: <http://www.ncosc.net/BEST/>
- Review conceptual materials
- Access BEACON Help
 - Access from an SAP transaction
 - URL: <http://help.mybeacon.nc.gov/beaconhelp>
- Practice what you've learned
 - URL: <https://mybeacon.nc.gov>
 - Client 899
 - Use your current NCID user name and password





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Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

Notes:



CONGRATULATIONS




You have completed the course

Please complete your course evaluation!

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Notes:

Demonstration and Exercise Summary



Transaction	Description	Type	Page #
Activity	Lesson Review Activity – Match Terms and Definitions	NA	46
NA	2.1 Log on to SAP	D	50
	2.2 Log on to SAP	E	51
NA	2.3 Use Menu Path and Matchcode	D	53
	2.4 Use Menu Path and Matchcode	E	54
PA10	2.5 Display Personnel File	D	55
	2.6 Display Personnel File	E	56
PA20	2.7 Display Actions	D	58
	2.8 Display Actions	E	59
PA20	2.9 Display an organizational assignment	D	60
	2.10 Display an organizational assignment	E	61
PA20	2.11 Display an employee's personal information	E	62
Activity	Course Review Activity	NA	66

Class Job Aids:

- *PA Actions and Reasons*
- *PA Infotypes*
- *Employee Groups and Subgroups*
- *Personnel Areas and Subareas*

D = Display

E = Exercise

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Notes: